

Optional Letter of Intent – Record Outcome

1 Introduction

When a Funding Opportunity Announcement (FOA) or a National Lab Announcement is created, the solicitation owner may choose to have applicants submit an optional Letter of Intent (LOI). The purpose of an LOI is to summarize the proposed project or research efforts to determine responsiveness to the solicitation.

Although not a structured process, the Project Manager (PM) in PAMS may choose to evaluate these LOIs and record an outcome based on their evaluation.

The purpose of this document is to provide step-by-step instructions for users to follow to record an outcome on an Optional LOI in PAMS.

2 Prerequisites

Before you can record an outcome on an Optional LOI in PAMS, the following criteria must be met:

- The user is registered in PAMS as a PM.
- The user is the PM assigned to the Solicitation.
- An Institution has submitted an Optional LOI to the Solicitation.

3 Recording an Outcome on an Optional Letter of Intent

Use the following steps to locate and record an outcome on an Optional LOI.

1. Log in to the PAMS internal website at: <https://pams.science.energy.gov/>
2. Navigate to the **Activities** tab. (Figure 1)



Figure 1. PAMS Homepage

3. Click **My Letters of Intent** in the Portfolio section in the left navigation menu. (Figure 2)

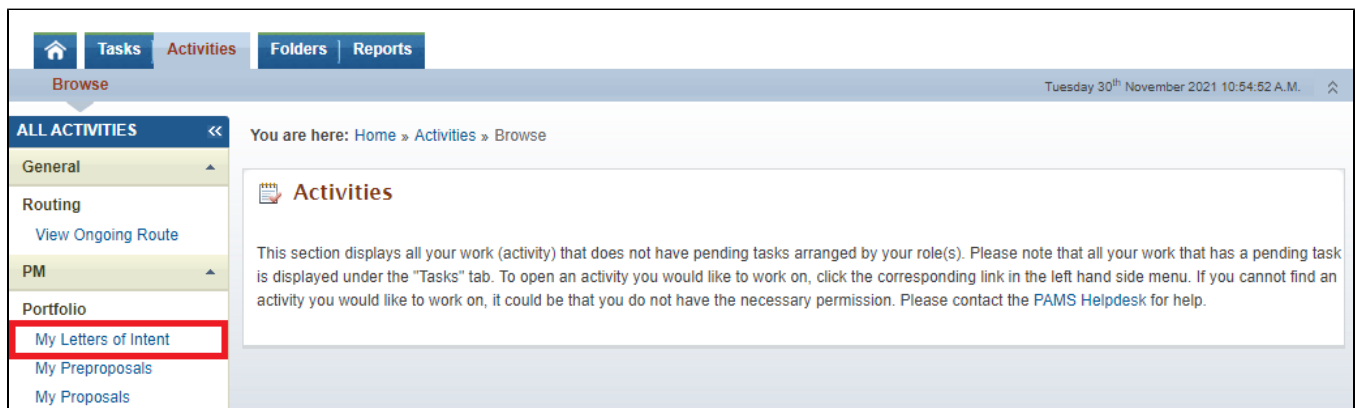


Figure 2. Activities, My Letters of Intent

4. PAMS will navigate to the My Letters of Intent (LOI) – List page, which displays all LOIs currently assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to find the LOI on which you would like to record an outcome. Once you have found the LOI, click the **Actions** / **Views** context menu in the Options column and select **Record Outcome**. (Figure 3)

The screenshot displays the 'My Letters of Intent (LOI) - List' page in the PAMS system. The page header includes navigation tabs: Home, Tasks, Activities (selected), Folders, and Reports. Below the header, there's a breadcrumb trail: 'You are here: Home » Activities » Browse » PM'. The left sidebar shows a tree view under 'ALL ACTIVITIES' with categories like General, Routing, PM (selected), Portfolio, and My Letters of Intent (selected). The main content area shows a table of LOIs. The table has columns: Solicitation, LOI Number, Institution Name, PI, LOI Received Date, Recommendation, and Options. A context menu is open over the 'Options' column of the first row, showing actions like 'Record Outcome', 'Email Applicant', 'Record Comments', 'Reassign PM', and 'View' options like 'Letter of Intent', 'Letter of Intent PDF', 'Cover Page', 'Solicitation', and 'Action History'. The 'Record Outcome' option is highlighted with a red box.

Figure 3. My Letters of Intent (LOI) – List, Record Outcome

5. PAMS will navigate to the Optional Letter of Intent – Record Outcome page, which displays all the information about the LOI. Select the "Encourage", "Discourage", or "No Response" radio button to record an outcome. (Figure 4)

Home

Tasks

Activities

Folders

Reports

Browse

Tuesday 30th November 2021 10:57:08 A.M.

ACTIVITIES

General

Routing

View Ongoing Route

PM

Portfolio

My Letters of Intent

My Preproposals

My Proposals

My Collaborative Proposals

My Procurement Requests

My Awards

Other Preproposal Actions

Bulk Preproposal Recommendation

Other Proposal Actions

Bulk Proposal Actions

Manage Virtual Proposal

Invite Applicant to Submit Proposal

Bulk Declination

Other Awards Actions

Bulk Award Actions

Reviewer Database

Create/Edit Reviewers

Review

Manage Criteria Set

Manage Criteria Responses - FOA

My Proposal Groups

Proposals

Rank SBIR Proposals

COV Admin

Setup

Manage COV

You are here: Home » Activities » Browse » PM [] » My Letters of Intent

Optional Letter of Intent - Record Outcome

Use this page to record a final status for this requested but optional LOI. You may choose Encourage, Discourage, or No Response as a final status. Use the required PM (+ View More)

LOI-0000000000: [Institution Name, City, State]

PI: [LastName, FirstName]

Resources

Supporting

Additional

Process

Letter Of Intent

Solicitation

Last DOE Internal Action/Comment (Visible only internally) (View All)

My Comments (Visible only to you)

No comment to display

Fields with * are required

Record Outcome

Outcome

Encourage

Discourage

No Response

PM Justification

(These comments will be viewable by PAMS Internal users only.)

PM Comments to Applicant

(Will be sent in the email to the Applicant PI.)

Cancel

Preview Email

Save and Submit

Figure 4. Optional Letter of Intent – Record Outcome

6. Provide a justification in the PM Justification field.

Note

Comments entered in the PM Justification field will be viewable by internal PAMS users only. To provide comments to the applicant, enter your comments in the PM Comments to Applicant field.

7. When you are finished, click **Save and Submit** in the bottom right corner of the page.

8. PAMS will return to the My Letters of Intent (LOI) – List page and display a green success message confirming that the decision has been recorded successfully. (Figure 5)

Home

Tasks

Activities

Folders

Reports

Browse

Tuesday 30th November 2021 11:00:08 A.M.

ALL ACTIVITIES <<

General

Routing

View Ongoing Route

PM

Portfolio

My Letters of Intent

My Preproposals

My Proposals

My Collaborative Proposals

My Procurement Requests

My Awards

Other Preproposal Actions

Bulk Preproposal Recommendation

Other Proposal Actions

Bulk Proposal Actions

Manage Virtual Proposal

You are here: Home » Activities » Browse » PM []

My Letters of Intent (LOI) - List

Letter(s) of Intent (LOI) currently assigned to you are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To (+ View More)

Success:

You have successfully recorded a decision of Encourage for the Letter of Intent.

Collapse Group | Detailed View | Search | Saved Searches

1

Page size: 100

Go

0 items in 1 page(s)

Solicitation	LOI Number	Institution Name	PI	LOI Received Date	Recommendation	Options

No records found.

1

Page size: 100

Go

0 items in 1 page(s)

Figure 5. My Letters of Intent (LOI) – List, Success